



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Attorney Heather H. Kruthers (for Public Guardian, Conservator)

## Probate Status Hearing Re: Status of Filing Fourth Accounting

<b>DOD: 4/16/2016</b>	<p><b>PUBLIC GUARDIAN</b>, was appointed Conservator of the Person and Estate on 11/21/06.</p> <p><b>Public Guardian's</b> Third Account was approved on 09/12/13. <b>Minute order from 09/12/13</b> set this status hearing regarding filing of the Fourth Account.</p> <p><b>Status Report Re: Filing of the Fourth Account filed 5/5/2016 for the previous Status Hearing states:</b></p> <ul style="list-style-type: none"> <li>At the 2/16/2016 hearing, the matter was continued to 5/17/2016;</li> <li>On 4/16/2016, the Conservatee passed away;</li> <li>Rather than filing a 4<sup>th</sup> account and then a 5<sup>th</sup> and final account, the Public Guardian will be filing a 4<sup>th</sup> and final account;</li> <li>However, the investment statement covering April has not been received to date, which will not allow time to complete the schedules and to prepare and file the final account before 5/17/2016;</li> <li>It is respectfully requested that the next status hearing for this matter be set no sooner than <b>60 days</b> from the date of this hearing.</li> </ul>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Continued from 5/17/2016</u> per request of counsel.</p> <p>1. Need fourth account, or verified status report pursuant to Probate Code § 12200, and proof of service of notice of the status hearing pursuant to Local Rule 7.5(B).</p>
<b>Cont. from 111315, 021616, 051716</b>		
<b>Aff.Sub.Wit.</b>		
✓ <b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
✓ <b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

<b>Reviewed by:</b> JF / LEG
<b>Reviewed on:</b> 7/21/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 1 - Dunlop</b>

**Second Amended Account Current and Report of Conservator; Petition of Conservator  
Petition for its Settlement, for Allowance of Attorneys Compensation and for its Termination**

		<p><b>DEBRA PASLEY</b>, Mother and Conservator of the Person and Estate with bond of \$15,000.00, is Petitioner. <i>(Not verified.)</i></p> <p><b>Account period: 3/28/13 – 10/17/14</b>  <b>Accounting: <u>Not provided</u></b>  Beginning POH: \$13,438.31  Ending POH: \$70,195.61  (\$1,715.61 plus a 1/5 interest in real property in Virginia valued at \$68,480.00)</p> <p><b>Petitioner states:</b> Inventory and Appraisal was filed 6/5/13 showing the value of the estate to be \$13,438.31. Summary of account and supporting schedules are provided at Exhibit B. <i>(See #1.)</i></p> <p>As reflected in prior pleadings, the Conservator and Conservatee moved out of state. The Conservator was appointed Guardian of the Conservatee in Oklahoma by Court order and Letters issued on 8/13/14.</p> <p>Petitioner does not request compensation for her services.</p> <p>Petitioner requests attorney's compensation as set forth in Exhibit "C." <i>(See #3.)</i></p> <p><b>Petitioner prays:</b></p> <ol style="list-style-type: none"> <li>1. That this account and report be approved and settled;</li> <li>2. That the acts of the Conservator shown in the account and report be approved;</li> <li>3. That, upon settlement of this account, the Conservator be directed to pay her attorneys, McCormick Barstow, LLP, compensation for services rendered and, as yet, unpaid;</li> <li>4. That the Conservatorship in California be terminated; and</li> <li>5. That the Court grant such other and further relief as it deems just and proper.</li> </ol>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 5/17/16:</b> Counsel represents that they have re-established contact with their client; requests 60 days.</p> <p>As of 7/20/16, nothing further has been filed. The following issues remain noted:</p> <p align="center"><b><u>SEE PAGE 2</u></b></p>	
Cont. from 042315, 060215, 081815, 091515, 102015, 120115, 010516, 020916, 051716				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input type="checkbox"/>	Verified			x
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
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<input type="checkbox"/>	Conf. Screen			
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<input type="checkbox"/>	Duties/Supp			
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<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			x
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

**Page 2 – NEEDS/PROBLEMS/COMMENTS:**

1. This petition does not provide any accounting in the form required by Probate Code §§ 2620, 1060, or any mandatory schedules on the required Judicial Council forms.

Need amended petition with accounting, schedules, including required mandatory form for summary. Although Petitioner has been appointed Guardian in Oklahoma, this Court retains jurisdiction for settling accounts pursuant to Probate Code §2630.

The only schedule provided at Exhibit B is a statement of property on hand, labeled as “receipts,” but which does not show any account summary, receipts, disbursements, etc., and further indicates that the conservatorship estate cash has been reduced by \$11,722.70 without explanation.

Note: The Conservatee’s interest in the Virginia real property is not an asset of this conservatorship estate, but should be referenced in its own schedule pursuant to §1063(h).

2. This petition is not verified by the Conservator as required by Probate Code §§ 1021, 1023.  
(Note: §1023 provides that an attorney may sign or verify on a client’s behalf if he or she is absent from the county unless the person is a fiduciary appointing in the proceeding.)
3. Petitioner requests attorney’s compensation pursuant to Exhibit C, but no Exhibit C is attached.
4. Need Notice of Hearing.
5. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §1460(b)(6) on:
  - Morgan Elizabeth Pasley (Conservatee)
  - Debra Pasley (Conservator/Fiduciary, since the petition is not verified by her)
  - David Hal Jones (Father)
6. *The Court may also require notice to the surety of any continued or future hearings.*

## Probate Status Hearing RE: Transfer of Personal Property

<b>DOD: 01/08/15</b>	<b>BROOKE A. CASTLE</b> , Granddaughter, was appointed Conservator of the Person and Estate on 8-15-13.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 011116, 031416, 042516</b>	Conservator's Second and Final Account was approved on 11/09/15. The Order Settling Second and Final Account authorized the conservator to transfer the balance of the property on hand, after payment of authorized fees, to Clayton James Stott, Successor Trustee of THE PATRICIA STOLL GREGORY STOLL SURVIVOR'S TRUST. An affidavit pursuant to Probate Code §§ 13100 – 13116 by Clayton James Stott was filed 10/19/15.	<u>Minute Order 4/25/16:</u> Counsel represent that a receipt is forthcoming and request 60 days. No appearance is necessary at the status hearing if the receipt is filed at least two court days prior.
<b>Aff.Sub.Wit.</b>		<b>As of 7/20/16, nothing further has been filed.</b>
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Minute Order from 10/19/15</b> set this status hearing regarding transfer of personal property.</p> <p><b>Declaration of Summer A. Johnson filed 3/10/16 states</b> the conservatee's personal property is presently located in a storage unit. Unfortunately, the trustee is unable to transfer the financial responsibility and take possession of the storage unit and items therein unless he appears in person at the storage unit. The trustee presently resides in the State of Washington. The Trustee has purchased airline tickets to travel to Fresno on March 22-24, 2016. Ms. Castle, the conservator, has indicated that she is not able to meet with the trustee that week because it coincides with Spring Break. Ms. Johnson has made a request of Ms. Castle's attorney, Mr. Shahbazian, that he or someone from his office provide access to the storage unit while the Trustee is in Fresno and she is awaiting confirmation from his office that someone will be able to meet with the trustee.</p> <p><b>Status Report filed 4/21/16 states</b> Mr. Stott met with the conservator and other family members at the storage unit where the conservatee's personal property was being held.</p> <p style="text-align: center;"><b>SEE PAGE 2.</b></p>	
		<b>Reviewed by:</b> JF/skc
		<b>Reviewed on:</b> 7/20/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 3- Stott</b>

## Page 2

**Status Report filed 4/21/16 by Summer Johnson, attorney for Trustee Clayton James Stott, states** Mr. Stott met with the conservator and other family members at the storage unit where the conservatee's personal property was being held. Other than the Conservatee's jewelry, it appears the majority of the personal property was held at the storage locker, with the exception of a German clock that couldn't be located, and several statues.

The parties present didn't have any information regarding the whereabouts of the German clock and it was theorized that Mrs. Stott's deceased son, Tim Stott, may have given it away during his lifetime. Additionally, it was reported that the statues were apparently broken during the conservatee's lifetime and disposed of.

Later that day, a meeting was held at the offices of Dowling Aaron Incorporated between Mr. Stott, the Conservator, some beneficiaries of the trust, and related family members, at which meeting the Conservator delivered the jewelry. As a result, some personal property items have been able to be delivered to their intended recipients pursuant to the trust.

Ms. Johnson requested that Mr. Shahbazian propose a receipt for Mr. Stott to execute in order for his client to be discharged as conservator. Additionally, she requested that the Conservator provide an informal accounting of any funds which were to be distributed from the conservatorship to Mr. Stott as trustee to the extent that funds had been utilized by the conservator since the end of the account period. Cash on hand at the end of the account period 6/22/15 was \$2,928.46.

The informal account was requested due to the fact that the storage unit was held in the name of the conservator's mother, and not in the name of the conservatorship, and was also storing a significant amount of items belonging to the conservator's deceased father, Tim Stott.

Ms. Johnson states she is awaiting the receipt and the informal accounting from Mr. Shahbazian.

**1) First Account of Administrator, and 2) Petition for Its Settlement**

<b>DOD: 5-22-13</b>		<p><b>TERRI JEAN</b>, Surviving Spouse and Administrator with Limited IAEA with bond of \$64,400, is Petitioner.</p> <p><b>Account period: 5-22-13 through 12-31-14</b>  Accounting: \$195,517.83  Beginning POH: \$195,517.83  Ending POH: \$195,517.83  (Cash of \$1,277.83 plus personal business property valued at \$185,740.00 and personal misc. musical instruments/gear valued at \$8,500.00)</p> <p><b>Petitioner states</b> the real property originally inventoried was found to have been owned in joint tenancy with Petitioner and thus was removed from Probate administration. See Quit Claim Deed attached to Corrected Inventory and Appraisal Partial No. 1 filed 2-18-15.</p> <p>Petitioner states the decedent executed the Quit Claim Deed on 10-6-08 transferring title to the real property located at 9077 E. Mountain View Ave., in Selma to: Randy A. Jean, an unmarried man, and Terri Lynn Wekseth, an unmarried woman, as joint tenants with rights of survivorship. Subsequent to execution, the decedent and Petitioner were married. The deed was recorded on 8-23-13. Prior to filing her petition for probate, Petitioner notified her attorney, Joanne Sanoian, about the quitclaim deed and was informed that because it was recorded after the decedent's death, the property had to be part of the estate. In January 2015, Petitioner contacted a realtor to list the property as ordered by the Court. The realtor informed current counsel Gregory J. Roberts of the Quit Claim Deed, which resulted in the corrected Inventory and Appraisal removing the real property from the estate.</p> <p>Petitioner states two creditor's claims have been filed, but remain unpaid.</p> <p><b>Petitioner prays for an order that:</b></p> <ol style="list-style-type: none"> <li><b>1) The first account of Petitioner as Administrator be settled, allowed and approved as filed;</b></li> <li><b>2) All acts and proceedings of Petitioner as Administrator relating to the matters set forth in the petition be confirmed and approved; and</b></li> <li><b>3) Such further orders as the Court considers proper.</b></li> </ol> <p><b><u>SEE ADDITIONAL PAGES</u></b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 6/14/16:</b> Report of Sale will be filed soon.</p> <p><b>Note:</b> On 8/6/15, Petitioner filed an I&amp;A reinstating the Selma property as an asset of this estate as well as a reappraisal for sale. <u>As such, it appears this account will require amendment after the sale.</u></p> <p><b>Note:</b> On 3/2/15, Randi Poe, daughter, filed Objection to Inventory; Petition to Establish Estate's Ownership of Real Property, and for Order Directing its Transfer to Estate (Probate Code §850(a)(2); 856), which is Page C of this calendar. That petition includes specific objections to the Quit Claim Deed referenced herein.</p> <p><b><u>SEE ADDITIONAL PAGES</u></b></p>
<b>Cont. from 031516, 061416</b>			
<b>Aff.Sub.Wit.</b>			
✓ <b>Verified</b>			
✓ <b>Inventory</b>			
✓ <b>PTC</b>			
✓ <b>Not.Cred.</b>			
✓ <b>Notice of Hrg</b>			
✓ <b>Aff.Mail</b>	W		
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
✓ <b>Letters</b>	11-20-13		
<b>Duties/Supp</b>			
✓ <b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
✓ <b>9202</b>			
✓ <b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
✓ <b>FTB Notice</b>			

**Objection to First Account of Administrator and Petition for 1) Surcharge; 2) Removal of Administrator; and 3) for Attorney Fees and Costs Advanced filed 4-3-15 by Randi Poe, Daughter states:**

- The real property was removed from the estate, but should be included in the accounting.
- Rental receipts for the taco truck owned by Ramiro Navarro that has been parked on the property (that has been removed from the estate) since 2004 are not included in the accounting. Obejctor believes receipts should reflect approx. \$16,830, which represents \$630/month from the taco truck per the agreement.
- Income from the sale of various personal property, which the administrator sold without notice, totaling approx. \$2,352.65 should be included in the accounting.
- Income from the rental of the real property should be included in the accounting. Objector states Terri Jean has not filed any petition for Probate Homestead and would only be entitled to remain in temporary possession until the inventory is filed and for a period of up to 60 days afterward without further order of this Court. Probate Code §6500. Administrator has been solely in control of the timing and filing of the inventory in this estate and it has taken her nearly two years to sort out what should have been a simple inventory.

**See also Declaration of Randi Jean in Support of Objection.**

**Objector requests an order that:**

- 1. Administrator be determined to be liable for rental income from the taco truck at \$630/month from 5-22-13 plus interest until recovered to the estate as set forth in the Objection;**
- 2. Administrator be determined to be liable for undisclosed income from the sale of various personal property in the amount of \$2,352.65 plus interest until recovered to the estate as set forth in the Objection;**
- 3. Administrator be determined to be liable for rental income from the property from 5-20-14 (60 days after filing I&A Partial #1) plus interest as set forth in the Objection;**
- 4. Monetary liability for the taco truck rents, property rent, and the undisclosed sale of the personal property be charged against the Administrator ordinary and any extraordinary fees;**
- 5. The Administrator be removed;**
- 6. Objector recover costs and attorney fees; and**
- 7. Such other and further orders be made as this Court may deem proper under the circumstances.**

**SEE ADDITIONAL PAGES**



NEEDS/PROBLEMS/COMMENTS (PETITIONER): The following issues remain noted:

1. Note previously stated: The Court may require authority for exclusion of the real property from the estate, given that the Quit Claim Deed was recorded after Decedent's death, and also given that the Court specifically made an order that the real property, which had previously been inventoried as an asset of the estate, is to be sold. (See Minute Order of 1-12-15.)

Update for 3/15/16: On 8/6/15, Petitioner filed an I&A reinstating the Selma property as an asset of this estate as well as a reappraisal for sale. As such, it appears this account may need to be amended.

As of 7/20/16, a Reappraisal for Sale has been filed, but the Report of Sale has not yet been filed.

2. In her Objection to Appointment of Randi Jean as Special Administrator filed 9-17-13, Petitioner describes various actions that she took with regard to Decedent's assets, including collection of rents, payment of expenses, transfer of title of various assets, theft of an asset, etc.

However, this First Account indicates no actions were taken at all since Decedent's death. The Court may require clarification.

3. Bond of \$64,400.00 does not appear sufficient. The Court may require an increase to at least \$195,517.83. See Cal. Rule of Court 7.204 (Duty to apply for order increasing bond).
4. Petitioner does not provide the reasons why the estate cannot be distributed and closed and an estimate of time needed to close administration pursuant to Probate Code §12200(a).  
Note: The Court will set a status hearing for the filing of the Final account as appropriate.

NEEDS/PROBLEMS/COMMENTS (OBJECTOR):

1. Objector requests removal of the Administrator in her objection to the Accounting; however, separate noticed petition may be required pursuant to Probate Code §8500.

**Objection to Inventory; Petition to Establish Estate's Ownership of Real Property,  
and for Order Directing its Transfer to Estate**

<b>DOD: 5-22-13</b>		<b>RANDI POE</b> , Daughter and interested person within the meaning of Probate Code §850(a)(2), is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>Petitioner states</b> on 10-6-08, Decedent executed a document titled "In case of death his will to protect people he had to" and had the same acknowledged by Sarbjeet Kaur, a licensed notary public, commission #2097311 (the "Will"). A copy of entry number 8 in the journal of notarial acts of Sarbjeet Kaur dated 10-6-08 is attached to this petition as Exhibit A. See also Exhibit B, which is a certification of notary journal entry executed 2-23-15 by Sarbjeet Kaur.	<b>Minute Order 6/14/16: Report of Sale will be filed soon.</b>	
<b>Cont. from 031516, 061416</b>				
	<b>Aff.Sub.Wit.</b>	On numerous occasions prior to his death, Decedent told Petitioner and her brother that "he would take care of them" if he died. In all conversations Petitioner had with Decedent from 2008 until he died, Decedent never once mentioned that his single most valuable asset, the real property located at 9077 E. Mountain View Ave., in Selma, had already been quitclaimed to himself and Terri Jean as joint tenants with rights of survivorship, and would therefore eventually be the sole property of Terri after his death.	<b>Note: On 8/6/15, Petitioner filed an I&amp;A reinstating the Selma property as an asset of this estate as well as a reappraisal for sale. As such, it appears this petition may be moot.</b>	
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b> w			
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>	Decedent died 5-22-13 in possession of and holding record title to the property.	<b>SEE ADDITIONAL PAGES</b>	
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
	<b>Order</b> x			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>	On 8-23-13, a document purporting to be a Quit Claim Deed was recorded against the property in Official Records of Fresno County as Doc #2013-0121190 (Exhibit C). The Quit Claim Deed purports to be executed on 10-6-08, but was not recorded until 8-23-13, nearly five years later.	<b>Reviewed by: skc</b>	
	<b>Citation</b>			<b>Reviewed: 7/20/15</b>
	<b>FTB Notice</b>			<b>Updates:</b>
		Page 4 of the Quit Claim Deed, the signature page of Decedent, is in a different font than pages 1-3, and includes entirely inappropriate text for a quitclaim deed as follows: "After my Will or (Estate Plan) this statement of my last wishes shall be voided."	<b>Recommendation:</b>	
		Petitioner states the Quit Claim Deed is fraudulent because the signature page from the Quit Claim Deed is from the Will, acknowledged by notary Sarbjeet Kaur, and the notarial journal and certification of Sarbjeet Kaur provide evidence of this.	<b>File – 4B Jean</b>	
<b>SEE ADDITIONAL PAGES</b>				

**Page 2**

**Petitioner states (Continued):** The recording caption of the Quit Claim Deed provides that Decedent himself requested recording and that after recording it should be returned to the property. Terri Jean resides at the property.

Petitioner was unaware of the Quit Claim Deed and only became aware of it on 2-18-15 when served with a copy of Inventory and Appraisal No. 1 Corrected Final filed 2-9-15 by Terri Jean, which removes the property from the estate. Petitioner states Terri Jean filed her petition for Letters of Administration on 9-17-13 and indicated the property was part of the estate and that Decedent died intestate. Until 2-9-15, Terri Jean had not disclosed the existence or produced a copy of the Quit Claim Deed or the Will.

Petitioner states Terri Jean did not investigate the validity of the Quit Claim Deed or did not do so thoroughly enough to look up the notary Sarbjeet Kaur and obtain copies of the notarial journal. Terri Jean is the only person that would benefit if the Quit Claim Deed were valid because the property would pass directly to her and would not be divided equally between her and the decedent's two children.

Petitioner states jurisdiction under Probate Code §850(a)(2) to resolve disputed property claims for estate property is concurrent and not exclusive. Authority provided.

**Petitioner requests that:**

- 1. Finding that all facts stated in the Petition are true and that all notices required by law have been duly given;**
- 2. The Court find and direct Terri Lynn Wekseth (Jean) to transfer and quitclaim any and all interest in the property to the Administrator of the Estate of Randy A. Jean;**
- 3. Such other and further orders be made as this Court may deem proper under the circumstances.**

**SEE ADDITIONAL PAGES**

**NEEDS/PROBLEMS/COMMENTS:**

1. The Notary Journal Entry at Exhibit A does not indicate a document type. The certification of notary journal entry referenced as Exhibit B verifies that the attached photocopies of the journal entry are true and correct; however, her statement as to the document type: "The Document type... Randy A Jean- In Case of Death. (His will to protect people he need to)" does not appear to be a verified statement, and this information is not reflected in the journal entry. The Court may require a verified declaration from the notary as to the specific nature of the document type that was notarized, or further documentation.
2. Petitioner appears to allege that this document dated 10-6-08 was the decedent's will, as set forth in the notary's declaration referenced in #1 above. The Court may require clarification as to why this document was never requested to be admitted to probate as a will, either previously, or now, with reference to Probate Code §8504. (Note: Admission would require production and proving. The original document has never been deposited with the Court pursuant to Probate Code §8200.)
3. Petitioner was originally granted a fee waiver in connection with her petition for appointment as special administrator, ex parte request for order shortening time, and petition for probate, which filing fees would total \$695.00. The filing fee for this petition (\$435) was paid. Examiner notes that outstanding filing fees will be due upon any distribution to Petitioner. Alternatively, as it appears Petitioner's circumstances may have changed, or her attorney may now be advancing fees, the Court may require further application pursuant to Government Code 68636(a).
4. Need order.

**5A Gary F. Morris, Sr., 2013 Trust****Case No. 13CEPR01104**

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr., Beneficiary)

Attorney Jennifer Walters (for Walter A. Morris, Successor Trustee)

**Petition to Compel Accounting by Trustee of the Gary F. Morris, Sr. 2013 Trust and Petition for Distribution of Trust Assets to Doug Standing, Trustee of the Gary Morris, Jr. Trust and Petition for Fees and Costs**

<b>DOD: 10/19/2013</b>	<b>GARY MORRIS, JR.</b> , Beneficiary, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b> <b>Page 5B</b> is a Fee Waiver Review.
	<b>Petitioner states:</b>		<b>Continued from 7/12/2016.</b> Minute Order states The Court removes Walter Morris as Successor Trustee and appoints Doug Standing as Temporary Successor Trustee until bond is posted. Bond will be set as previously ordered <b>[\$152,137.88.]</b> Mr. Standing is to take control of all assets and any cash is ordered to be placed into a blocked account. Bond Company will be notified <i>[by Doug Standing.]</i> Proof of amount in bank account needs to be filed with the court. Walter Morris is to be personally present at the 7/26/16 hearing. <i>[Court records do not show an accounting has been filed as of 7/21/2016.]</i>
<b>Cont. from 100615, 111715, 010516, 020916, 031516, 050316, 053116, 071216</b>	<ul style="list-style-type: none"> <li><b>WALTER A. MORRIS</b> was appointed as Successor Trustee of the <b>GARY F. MORRIS, SR., 2013 TRUST</b> on 4/1/2014 <i>[copy of Trust attached as Exhibit A to Declaration of Clerical Error and Omissions filed 10/2/2015];</i></li> <li>The <b>GARY F. MORRIS, SR., 2013 TRUST</b> terms provide that the balance of the Trust estate, including all assets poured into the Trust as a result of Trustor's death, is to be distributed to <b>BARBARA TURNER</b>, Trustee of the <b>GARY F. MORRIS, JR., TRUST</b>;</li> <li><b>BARBARA TURNER</b> resigned as Trustee of both Trusts, and <b>WALTER A. MORRIS</b> was appointed as Successor Trustee;</li> <li>Petitioner requests the Court compel <b>WALTER A. MORRIS</b>, as Trustee of the <b>GARY F. MORRIS, SR., 2013 TRUST</b>, to distribute the remaining assets in the <b>GARY F. MORRIS, SR., 2013 TRUST</b> to <b>DOUG STANDING</b>, Trustee of the <b>GARY F. MORRIS, JR., TRUST</b> within 30 days of the order approving this petition; ~Please see additional page~</li> </ul>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>			1. Filing fee of <b>\$435.00</b> is currently due from Petitioner, who filed the <i>Petition</i> using a fee waiver, which is pending. The <b>\$435.00</b> filing fee is appropriately payable from Trust assets. <i>Declaration of Clerical Error and Omissions</i> filed 10/2/2015 states "Petitioner agrees that a filing fee should be paid by Walter Morris, Trustee of the <b>GARY F. MORRIS, SR., 2013 TRUST</b> ; however, Walter Morris is not communicating with the beneficiary, Gary Morris, Jr., his attorney, nor the Successor Trustee of the <b>GARY F. MORRIS, JR., TRUST</b> ; the beneficiary has no access to funds of the Trust." Court removed the former Trustee such that Trust funds appear accessible to pay Court fees pending the fee waiver.
<input checked="" type="checkbox"/> <b>Verified</b>			
<input type="checkbox"/> <b>Inventory</b>			
<input type="checkbox"/> <b>PTC</b>			
<input type="checkbox"/> <b>Not.Cred.</b>			
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>			
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	W	/	
<input type="checkbox"/> <b>Aff.Pub.</b>			
<input type="checkbox"/> <b>Sp.Ntc.</b>			
<input type="checkbox"/> <b>Pers.Serv.</b>			
<input type="checkbox"/> <b>Conf. Screen</b>			
<input type="checkbox"/> <b>Letters</b>			
<input type="checkbox"/> <b>Duties/S</b>			
<input type="checkbox"/> <b>Objections</b>			
<input type="checkbox"/> <b>Video Receipt</b>			
<input type="checkbox"/> <b>CI Report</b>			
<input type="checkbox"/> <b>9202</b>			
<input checked="" type="checkbox"/> <b>Order</b>			
<input type="checkbox"/> <b>Aff. Posting</b>			
<input type="checkbox"/> <b>Status Rpt</b>			
<input type="checkbox"/> <b>UCCJEA</b>			
<input type="checkbox"/> <b>Citation</b>			
<input type="checkbox"/> <b>FTB Notice</b>			
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 7/21/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 5A – Morris</b>

**5A**

**Petitioner states, continued:**

- **GARY F. MORRIS, SR., 2013 TRUST** terms provide that the Trustee shall periodically, but not less than once each year, render an account of its administration of the Trust(s) under the Trust instrument to all current income beneficiaries;
- **GARY F. MORRIS, SR's.**, date of death is 10/9/2013 [sic]; **WALTER A. MORRIS** was appointed as Successor Trustee on 4/1/2014; to date, no accounting has been received from **WALTER A. MORRIS**.

**Petitioner prays the Court Order:**

1. An accounting from **WALTER A. MORRIS** from the period when he was Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** from 4/1/2014 until 8/31/2015;
2. **WALTER A. MORRIS**, Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**, [shall] distribute all of the remaining assets in the **GARY F. MORRIS, SR., 2013 TRUST** to **DOUG STANDING**, Trustee of the **GARY F. MORRIS, JR., TRUST** within 30 days of the signed of the order approving this *Petition*;  
and
3. Allowing attorney fees and costs to Petitioner to be paid by Walter Morris for failure to file accounting and distribute assets pursuant to **GARY F. MORRIS, SR., 2013 TRUST** terms.

**Notes for background:**

- **Order Removing Walter Morris as Trustee of the GARY F. MORRIS, SR., 2013 TRUST, Appointing Doug Standing as Temporary Successor Trustee; Instructing BofA to Transfer Funds in Checking Account Ending in #8078 to Doug Standing, Successor Trustee of the Gary F. Morris, Sr. 2013 Trust, was filed 7/20/2016.** Order finds Doug Standing is to deposit all of the funds withdrawn from the [account] into a blocked account in his name as Successor Trustee; Doug Standing is to notify the bonding company of the change of trustees and complete an application for **\$152,137.88** bond and file proof of bond with the Court; Doug Standing is to file with the Court proof of the amount in the previous account and the amount deposited into the blocked account; and **WALTER A. MORRIS** is to be personally present at the 7/26/2016 hearing.
- **Minute Order dated 5/3/2016** from a previous hearing states Ms. Walters called the Court this morning to advise of her inability to appear today; her office asked Ms. LeVan to request a continuance.
- **Minute Order dated 3/15/2016** from a previous hearing states counsel is in disagreement as to what has been provided. If all of the information has not been provided by 5/3/2016, then Walter Morris is ordered to be personally present or present via CourtCall on 5/3/2016. Walter Morris did not appear in Court.
- **Minute Order dated 1/5/2016** from the a previous hearing states Ms. Walters represents that there have been continued difficulties in obtaining the bank statements, but the accounting is otherwise completed and ready for filing. Ms. LeVan agrees to the accounting being filed without the missing statements; Ms. Walters will proceed with the filing.
- **Order Setting Bond Amount filed 4/25/2015** set bond at **\$286,000.00**, proof of which was filed on 5/9/2014. **Order Reducing Bond Amount** filed 5/13/2015 finds that the bond amount for **WALTER A. MORRIS**, as Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** is reduced to **\$152,137.88**, which is the amount of net proceeds [distributed to the seller of the Trust real property] plus **10%**.

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr.)

## Fee Waiver Review

DOD: 10/19/2013		NEEDS/PROBLEMS/COMMENTS:  <u>Continued from 7/12/2016.</u>
Cont. from 100615, 111715, 010516, 020916, 031516, 050316, 053116, 071216		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 7/21/16
		Updates:
		Recommendation:
		File 5B – Morris

**Probate Status Hearing RE: Filing of the First and Final Account**

<b>DOD: 6/18/14</b>	<b>ALESHA J. JENSEN</b> , Daughter, was appointed Administrator with Full IAEA without bond on 12/9/14. Letters issued on 12/10/14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>1. Need first account or petition for final distribution or current written status report per Local Rule 7.5.</b>
<b>Cont. from 020916, 051016</b>	At the hearing on 12/9/14, the Court set this status hearing for the filing of the first account or petition for final distribution.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>	<b>Status Report filed on 2/8/16</b> states Alesha J. Jensen is preparing to file a petition for final distribution of the entire estate. However, more than 75% of the value of the decedent's estate is comprised of vehicles, tractors, farm equipment, trailers, guns, tools other miscellaneous equipment that is not easily distributable in undivided interests. The heirs would like for certain of such items to be distributed in kind to identified heirs. Also, one of the heirs desires to purchase the estate's interest in certain other vehicles, tractors, farm equipment, trailers, guns etc. and expects to obtain financing to complete the intended purchases. Alesha J. Jensen requests a continuance of 90 days to give the prospective purchasing heir time to obtain the necessary financing.	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		<b>Reviewed by:</b> skc
<input checked="" type="checkbox"/> <b>Status Rpt</b>	<b>Status Report filed 5/9/16</b> states the prospective purchasing heir remains in the process of arranging for appropriate financing to purchase the estate's interest in certain assets. Therefore, the personal representative requests continuance of the instant status hearing for a period of 60 days to give the heir time to obtain financing and for the sale to be completed after giving notice of proposed sale to interested parties.	<b>Reviewed on:</b> 7/20/16
<input type="checkbox"/> <b>UCC/JEA</b>		<b>Updates:</b> \
<input type="checkbox"/> <b>Citation</b>		<b>Recommendation:</b>
<input type="checkbox"/> <b>FTB Notice</b>		<b>File 6- Bergen</b>



**First and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and His Attorney; Termination of Conservatorship of the Estate; and Distribution.**

			<b>PUBLIC GUARDIAN</b> , Conservator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need proof of service on conservatee, Barbara Skopec.  2. Order includes a statement for distribution to include "any other property of the deceased conservatee not now known or discovered." The conservatee is not deceased. In addition, a conservatorship cannot distribute property that has not been included in the conservatorship. – Examiner has crossed out that portion of the order.
			Account period: 1/15/15 – 5/31/16	
<b>Cont. from</b>			Accounting - <b>\$4,875.49</b>	
	<b>Aff.Sub.Wit.</b>		Beginning POH - <b>\$4,875.49</b>	
✓	<b>Verified</b>		Ending POH - <b>\$4,471.39</b>	
	<b>Inventory</b>		Conservator - <b>\$1,064.76</b>	
	<b>PTC</b>		(9.31 Deputy hours @ \$96/hr and 2.25 Staff hours @ \$76/hr)	
	<b>Not.Cred.</b>		Attorney - <b>\$600.00</b> (less than allowed per Local Rule)	
✓	<b>Notice of Hrg</b>		Court fees - <b>\$52.00</b> (certified copies)	
✓	<b>Aff.Mail</b>	W/	<b>Petitioner states</b> the purpose of the conservatorship was to allow the Public Guardian to marshal an IRA from the father's estate. All other assets are held in trust. The IRA was marshaled, and the cash is ready for distribution to the Trustee. Since the purpose of the conservatorship was accomplished, it is no longer needed, and petitioner requests that the conservatorship of the estate be terminated.	
	<b>Aff.Pub.</b>		<b>Petitioner prays for an Order:</b>	
	<b>Sp.Ntc.</b>		1. Approving, allowing and settling the first and final account;	
	<b>Pers.Serv.</b>		2. Authorizing the conservator and attorney fees and commissions;	
	<b>Conf. Screen</b>		3. Payment of the court fees;	
	<b>Letters</b>		4. Authorize petitioner to distribute the remaining estate of \$2,319.63 to Lisa Lepper, trustee of the Conservatee's trust.	
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			

<b>Reviewed by:</b> KT
<b>Reviewed on:</b> 7/20/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 7- Skopec</b>

Executor Debra Zahariades (Pro Per, Executor)

## Petition for Final Distribution on Waiver of Accounting

<b>DOD: 12/1/2014</b>		<b>DEBRA ZAHARIADES</b> , daughter and Executor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 6/28/2016.</b> Minute Order states Petitioner will cure the noticing defect. If documents are filed, the Court is inclined to sign the order and hearing may come off calendar.
		Accounting is waived.	
<b>Cont. from 062816</b>		I & A — <b>\$268,000.00</b>	<b>The following issue from the last hearing remains:</b>  1. <i>Petition</i> does not contain a statement regarding whether notice of the administration of the estate has been sent to the Franchise Tax Board as required pursuant to Probate Code 9202(c)(1). <i>Notice of Petition to Administer Estate</i> filed 6/27/2016 contains an <u>incorrect mailing address</u> for the Franchise Tax Board for the purposes of probate administration proceedings; official website of the Franchise Tax Board provides the correct specific address for notice of estate administration per Probate Code § 9202.
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	POH — <b>\$254,500.00</b> (\$2,500.00 cash)	
<input checked="" type="checkbox"/>	<b>Verified</b>	Executor — <b>waives</b>	
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	<b>Distribution pursuant to Decedent's Will is to:</b>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w/	<ul style="list-style-type: none"> <li><b>DENISE HARDOY – \$1,250.00 cash</b>, an undivided ½ interest in real property, and an undivided ½ interest in trailer (consent filed 6/21/2016);</li> <li><b>DEBRA ZAHARIADES – \$1,250.00 cash</b>, an undivided ½ interest in real property, and an undivided ½ interest in trailer (consent filed 6/21/2016).</li> </ul>	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b> 032415		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b> X		
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 7/21/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 8- Palmer</b>

9 **Ray Soltero (Estate)**  
Attorney Hiyyama, Dean (for Executor Bertha Soltero)

Probate Status Hearing RE: First or Final Account

Dept. 303, 9:00 a.m. Tuesday, July 26, 2016

<b>DOD: 5/26/14</b>		<p><b>BERTHA SOLTERO</b>, Spouse, was appointed Executor with Full IAEA without bond on 2/10/15. Letters issued 2/20/15.</p> <p>At the hearing on 2/10/15, the Court set this status hearing for the filing of the first account or petition for final distribution.</p> <p><b>Status Report filed 4/4/16 by Attorney Hiyama states</b> the estate assets consist of four real properties. Two have been sold and another is being held to be distributed among the beneficiaries. The last remaining property is in the process of being sold. After Notice of Proposed Action has been filed and the time period for objections has passed, the first and final account and petition for final distribution will be prepared. Mr. Hiyama requests the Court continue this status hearing for approx. 90 days to allow escrow to close on the sale and prepare a petition for final distribution.</p> <p><b>Status Report filed 7/14/16 states</b> the last remaining property is currently in the process of being sold. Escrow has yet to close because the title company has not received the payoff amount from the mortgage lender holding the current loan on the subject property. Mr. Hiyama requests an additional 90 days.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>1. Need first account or petition for final distribution pursuant to Probate Code §12200.</b></p>
<b>Cont. from 041216</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 7/20/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 9- Soltero</b></p>	

**First Account Current and Report of Conservator and Petition for Allowance  
of Compensation to Conservator and Attorney and for Dispensation of Further  
Accounts**

			<b>PUBLIC GUARDIAN</b> , Conservator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			Account period: 2/11/15 – 5/31/16	
<b>Cont. from</b>			Accounting - <b>\$322,775.36</b>	
	<b>Aff.Sub.Wit.</b>		Beginning POH - <b>\$247,081.81</b>	
✓	<b>Verified</b>		Ending POH - <b>\$ 11,455.98</b>	
	<b>Inventory</b>		Conservator - <b>\$3,850.16</b>	
	<b>PTC</b>		(31.73 Deputy hours @ \$96/hr and 10.58 Staff hours @ \$76/hr)	
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>		Attorney - <b>\$2,500.00</b> (per Local Rule)	
✓	<b>Aff.Mail</b>	W/		
	<b>Aff.Pub.</b>		Bond fee - <b>\$144.64</b> (o.k.)	
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>		Court fees - <b>\$617.00</b> (filing fees and certified copies)	
	<b>Conf. Screen</b>		Petitioner states that the conservatorship estates meets the requirements of Probate Code § 2628(b) to dispenses with further accountings. Petitioner requests that the court dispense with further accountings as long as conservatorship estate continues the requirements of Probate Code §2628(b).	
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>		<b>Petitioner prays for an Order:</b>	
	<b>Aff. Posting</b>		5. Approving, allowing and settling the first account;	
	<b>Status Rpt</b>		6. Authorizing the conservator and attorney fees and commissions;	
	<b>UCCJEA</b>		7. Payment of the bond fee;	
	<b>Citation</b>		8. Dispensing with further accountings.	
	<b>FTB Notice</b>			

Reviewed by: KT

Reviewed on: 7/20/16

Updates:

Recommendation:

File 10- Beatty

11A

Attorney  
Attorney  
Attorney**Anna Hepner Living Trust**

Krbechek, Randolph (for Jerry Prudek – Beneficiary – Petitioner)

Teixeira, J. Stanley (for Glenn J. Hepner, George Hepner, Jr., and Jimmy Hepner)

Horton, Lisa (for Beneficiary Dolly Simpson)

**Case No. 15CEPR00425****Verified Petition for Accounting and for Order Instructing Co-Trustees and Compelling Final Distribution From Trust [Probate Code §§ 16062, 17200(b)(4), (5), and (6)]**

<b>Anna Hepner</b> <b>DOD: 4/24/08</b>		<b>JERRY PRUDEK</b> , Beneficiary, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 6/7/16:</u> The Court orders that the required accounting be provided; Ms. Walters requests 45 days to provide said account. (See Page B.)  1. Need order. 2. Other than the Stipulation to Continue Hearing filed 6/5/15 that indicated a mediation was scheduled that would include all five beneficiaries, no party other than Petitioner Jerry Prudek has made formal appearance in this matter or filed any opposition or other response. If this matter is to proceed with trial, the Court may require written response or appearance by all participating parties.																																																																				
<b>Cont. from 060815, 072215, 091715, 121715, 021616, 032916, 060716</b> <table border="1"> <tr><td></td><td><b>Aff.Sub.Wit.</b></td><td></td></tr> <tr><td>✓</td><td><b>Verified</b></td><td></td></tr> <tr><td></td><td><b>Inventory</b></td><td></td></tr> <tr><td></td><td><b>PTC</b></td><td></td></tr> <tr><td></td><td><b>Not.Cred.</b></td><td></td></tr> <tr><td>✓</td><td><b>Notice of Hrg</b></td><td></td></tr> <tr><td>✓</td><td><b>Aff.Mail</b></td><td>W</td></tr> <tr><td></td><td><b>Aff.Pub.</b></td><td></td></tr> <tr><td></td><td><b>Sp.Ntc.</b></td><td></td></tr> <tr><td></td><td><b>Pers.Serv.</b></td><td></td></tr> <tr><td></td><td><b>Conf. Screen</b></td><td></td></tr> <tr><td></td><td><b>Letters</b></td><td></td></tr> <tr><td></td><td><b>Duties/Supp</b></td><td></td></tr> <tr><td></td><td><b>Objections</b></td><td></td></tr> <tr><td></td><td><b>Video Receipt</b></td><td></td></tr> <tr><td></td><td><b>CI Report</b></td><td></td></tr> <tr><td></td><td><b>9202</b></td><td></td></tr> <tr><td></td><td><b>Order</b></td><td>X</td></tr> <tr><td></td><td><b>Aff. Posting</b></td><td></td></tr> <tr><td></td><td><b>Status Rpt</b></td><td></td></tr> <tr><td></td><td><b>UCCJEA</b></td><td></td></tr> <tr><td></td><td><b>Citation</b></td><td></td></tr> <tr><td></td><td><b>FTB Notice</b></td><td></td></tr> </table>				<b>Aff.Sub.Wit.</b>		✓	<b>Verified</b>			<b>Inventory</b>			<b>PTC</b>			<b>Not.Cred.</b>		✓	<b>Notice of Hrg</b>		✓	<b>Aff.Mail</b>	W		<b>Aff.Pub.</b>			<b>Sp.Ntc.</b>			<b>Pers.Serv.</b>			<b>Conf. Screen</b>			<b>Letters</b>			<b>Duties/Supp</b>			<b>Objections</b>			<b>Video Receipt</b>			<b>CI Report</b>			<b>9202</b>			<b>Order</b>	X		<b>Aff. Posting</b>			<b>Status Rpt</b>			<b>UCCJEA</b>			<b>Citation</b>			<b>FTB Notice</b>	
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	<b>PTC</b>																																																																						
	<b>Not.Cred.</b>																																																																						
✓	<b>Notice of Hrg</b>																																																																						
✓	<b>Aff.Mail</b>	W																																																																					
	<b>Aff.Pub.</b>																																																																						
	<b>Sp.Ntc.</b>																																																																						
	<b>Pers.Serv.</b>																																																																						
	<b>Conf. Screen</b>																																																																						
	<b>Letters</b>																																																																						
	<b>Duties/Supp</b>																																																																						
	<b>Objections</b>																																																																						
	<b>Video Receipt</b>																																																																						
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	<b>9202</b>																																																																						
	<b>Order</b>	X																																																																					
	<b>Aff. Posting</b>																																																																						
	<b>Status Rpt</b>																																																																						
	<b>UCCJEA</b>																																																																						
	<b>Citation</b>																																																																						
	<b>FTB Notice</b>																																																																						
<table border="1"> <tr><td colspan="3"><b>Reviewed by:</b> skc</td></tr> <tr><td colspan="3"><b>Reviewed on:</b> 7/20/16</td></tr> <tr><td colspan="3"><b>Updates:</b></td></tr> <tr><td colspan="3"><b>Recommendation:</b></td></tr> <tr><td colspan="3"><b>File 11A - Hepner</b></td></tr> </table>			<b>Reviewed by:</b> skc			<b>Reviewed on:</b> 7/20/16			<b>Updates:</b>			<b>Recommendation:</b>			<b>File 11A - Hepner</b>																																																								
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<b>Recommendation:</b>																																																																							
<b>File 11A - Hepner</b>																																																																							

## Status RE: Filing of a Formal Accounting

<b>Anna Hepner</b> <b>DOD: 4/24/08</b>			<b>JERRY PRUDEK</b> , Beneficiary, filed a Petition for Accounting and for Order Instructing Co-Trustees and Compelling Final Distribution from Trust on 4/22/16.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Need account by trustees or written status report per Local Rule 7.5.</b>
			<b>No response or formal appearances have been made by other parties;</b> however, it appears Attorney J. Stanley Teixeira represents Geln J. Hepner, George Hepner, Jr., and Jimmy A. Hepner (per Stipulation to Continue Hearing filed 6/5/15), and Dolly Simpson is separately represented by Attorney Lisa Horton (per Minute Order 3/29/16).  On 3/29/16 at a status hearing re mediation and agreement, the Court continued the matter for further settlement attempts.  At hearing on 6/7/16, the Court ordered that the required accounting be provided. Ms. Walters (specially appearing for Ms. Horton), requested 45 days.	
	<b>Aff.Sub.Wit.</b>			
	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
	<b>Notice of Hrg</b>			
	<b>Aff.Mail</b>			
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>		<div> <div>Reviewed by: skc</div> <div>Reviewed on: 7/20/16</div> <div>Updates:</div> <div>Recommendation:</div> <div>File 11B- Hepner</div> </div>	
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			

**First Amended First and Final Account and Report of Status of Administration of Administrator and Petition for Settlement Thereof; for Allowance of Statutory Attorney's Fees and Administrator's Compensation; for Extraordinary Attorney's Fees; for Costs Reimbursement and for Final Distribution.**

<b>DOD: 6/18/15</b>		<b>KENNITH E. HORN</b> , Administrator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: 12/1/15 – 5/11/16	
<b>Cont. from</b>		Accounting - <b>\$80,630.31</b>	
<b>Aff.Sub.Wit.</b>		Beginning POH - <b>\$80,300.00</b>	
		Ending POH - <b>\$76,777.81</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>		
		Administrator - <b>\$3,147.00</b> (greater than statutory)	
<input checked="" type="checkbox"/>	<b>Inventory</b>		
		Attorney - <b>\$3,147.00</b> (greater than statutory)	
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
		Attorney X/O - <b>\$5,637.50</b> (per itemization for 20.50 hours @ \$275/hr for sale of real property without a broker)	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>		Costs - <b>\$2,470.10</b> (filing fees, publication, probate referee, certified copies)	
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>	11/4/15 Closing - <b>\$1,287.74</b>	
<b>Duties/Supp</b>			
<b>Objections</b>		Creditors - <b>\$8,288.47</b>	
<b>Video Receipt</b>		<b>Distribution pursuant to intestate succession and assignments of interest is to:</b>	
<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>9202</b>	Katharine Dennis - \$10,560.00	
<input checked="" type="checkbox"/>	<b>Order</b>	Carol Zimmerman - \$10,560.00	
		David Horn - \$7,060.00	
		Kennith Horn - \$3,560.00	
<b>Aff. Posting</b>		April Guevara - \$3,520.00	
<b>Status Rpt</b>		Michelle Horn - \$3,520.00	
<b>UCCJEA</b>		Shawn McGill - \$3,520.00	
<b>Citation</b>		Approved Inheritance Cash - \$10,500.00	
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> KT
			<b>Reviewed on:</b> 7/20/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 13- Clark</b>

## First and Final Report of Personal Representatives, Petition for Final Distribution, and Allowance of Attorneys' Fees on Waiver of Accounting

<b>DOD: 8/19/2015</b>		<b>RALPH RENDON and GABRIEL RENDON,</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		sons/co-administrators with full IAEA without bond, are petitioners.		
		Accounting is waived		
<b>Cont. from</b>		I&A - <b>\$365,524.44</b>		
	<b>Aff.Sub.Wit.</b>	POH - <b>\$357,050.88</b>		
✓	<b>Verified</b>	(\$94,050.88 is cash)		
✓	<b>Inventory</b>	Co-administrators - waive		
✓	<b>PTC</b>	Attorney - <b>\$10,310.49</b>		
✓	<b>Not.Cred.</b>	(statutory - per agreement, to be paid at their agreed rates not to exceed the statutory sum of \$10,310.49)		
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>	Costs - <b>\$460.50</b>		
		(filing fees, certified copy fees)		
	<b>Aff.Pub.</b>	Closing - <b>\$5,000.00</b>		
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>	<b>Distribution, pursuant to intestate succession preliminary distributions, and consents of heirs, is to:</b>		
	<b>Letters 11-5-2015</b>	Cynthia \$18,655.98 cash		
	<b>Duties/Supp</b>	Stephen \$13,655.98 cash		
	<b>Objections</b>	(includes \$5,000 offset for Toyota Camry)		
	<b>Video Receipt</b>	Robert \$8,655.97 cash		
	<b>CI Report</b>	(includes \$10,000 offset for Dodge Ram)		
✓	<b>9202</b>	Gabriel \$18,655.98 cash		
✓	<b>Order</b>	Ralph \$18,655.98 cash		
	<b>Aff. Posting</b>	and equal shares of miscellaneous household furniture and furnishings and personal effects, and real property located at: 979 Maple Avenue, Fowler CA.		
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
✓	<b>FTB Notice</b>			
				<b>Reviewed by:</b> SEF
				<b>Reviewed on:</b> 7/20/2016
			<b>Updates:</b>	
			<b>Recommendation:</b> SUBMITTED	
			<b>File 14- Rendon</b>	



**16 Christopher Harshaw, Jr., and Ciara Harshaw (GUARD/P)****Case No. 16CEPR00191****Petitioner Harshaw, Anna Marie (Pro Per – Paternal Aunt – Petitioner)****Petition for Appointment of Guardian of the Person**

See petition for details.			<b>NEEDS/PROBLEMS/ COMMENTS:</b>  <u>Minute Order 6/14/16:</u> Anna Harshaw was handed objection in open court by the deputy. Any responses need to be filed by 7/12/16.  <u>Note:</u> Response was filed 6/30/16.
Cont. from 042616, 061416			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
✓	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 7/20/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 16- Harshaw</b>

Petitioner Gloria M. Encinas (Pro Per, paternal grandmother)

## Petition for Appointment of Guardian of the Person

		<b>TEMPORARY GRANTED ON COURT'S OWN MOTION EXPIRES 6/28/2016; extended to 7/26/2016</b>  <b>GLORIA M. ENCINAS</b> , paternal grandmother, is Petitioner.  <i>~Please see petition for details~</i>  <b>Court Investigator's Report was filed on 4/29/2016.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>Continued from 6/28/2016.</b></u> Minute Order states Ms. Encinas needs to keep trying to locate [the maternal grandfather] Jose Mora, including looking on Facebook.  <b>The following issue from the last hearing remains:</b> 1. If Court does not find due diligence per the Declaration filed 7/8/2016, Court may require proof of service by mail of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, for: <ul style="list-style-type: none"> <li>Jose Simon Mora, maternal grandfather. (Declaration of Due Diligence filed 7/8/2016 states Ms. Encinas sent a text on 5/21/2016 to the maternal grandmother asking for a picture of Jose Simon Mora; she received no response; she sent a text to her on 7/2/2016 asking for a phone number for him to let him know about the hearing, and she again received no response.)</li> </ul>	
Cont. from 051716, 062816				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: LEG		
		Reviewed on: 7/21/16		
		Updates:		
		Recommendation:		
		File 17- Encinas		

Petitioner Hernandez, David (Pro Per Petitioner)  
 Petitioner Hernandez, Arminda (Pro Per Petitioner)

## Petition for Appointment of Guardian of the Person

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			<p><b>Minute Order 6/14/16:</b> The Court Investigator is to follow upon the reports from CPS.</p> <p><b>Note:</b> A supplemental report was filed 7/15/16.</p> <p>As of 7/20/16, the following issue remains noted:</p> <p>1. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on the unknown father and paternal grandparents.</p>
Cont. from 061416			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 7/20/16
			Updates:
			Recommendation:
			File 18- Ruiz

Petition for Probate of Will and for Letters Testamentary. Authorization to Administer  
the Independent Administration of Estates Act

under

<b>DOD: 3/5/16</b>		<b>JOYCE ROSENWALD</b> , named executor without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Petitioner is a resident of Corvallis, OR.	<b>Minute Order 6/21/16:</b> Counsel informed the court that the value may increase; that's why probate has been chosen (over summary administration).
<b>Cont. from 062116</b>		Full IAEA – ok	
✓	<b>Aff.Sub.Wit.</b>	Will dated 5/19/07	<b>The following issue remains noted:</b>
✓	<b>Verified</b>		
	<b>Inventory</b>	Residence: Fresno	<b>1. Petitioner is a resident of Corvallis, OR; therefore, bond of \$136,853.00 may be required pursuant to Probate Code §8571 and CRC 7.201(b).</b>
	<b>PTC</b>	Publication: Business Journal	
	<b>Not.Cred.</b>	<b>Estimated value of estate:</b>	<b>Note:</b> Petitioner is reminded of her duty to apply for increased bond if necessary. CRC 7.204.
✓	<b>Notice of Hrg</b>	Personal property: \$ 10,000.00	
✓	<b>Aff.Mail</b>	Real property: \$126,853.00	<b>Note:</b> If granted, the court will set status hearings as follows:
✓	<b>Aff.Pub.</b>	Total: \$136,853.00	
	<b>Sp.Ntc.</b>	Probate Referee: Rick Smith	<ul style="list-style-type: none"> <li>• Tuesday, August 30, 2016 for filing of bond (\$136,853.00);</li> <li>• Tuesday, January 3, 2017 for filing Inventory and Appraisal;</li> <li>• Tuesday, October 24, 2017 for filing the first account or petition for final distribution.</li> </ul>
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
✓	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 7/20/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 19- Nelson</b>

**20 Clarke Gillis, Veronica Black, Victoria Gillis, Christian Gillis, Joseph Gillis  
(GUARD/P) Case No. 16CEPR00556**

Petitioner Black, Tod (Pro Per – Maternal Grandfather – Petitioner)

Petitioner Black, Virginia (Pro Per – Maternal Grandmother – Petitioner)

**Petition for Appointment of Guardian of the Person**

Veronica Black, 15	<p><b><u>TEMPORARY DENIED ON 06/09/2016</u></b></p> <p><b>TOD BLACK and VIRGINIA BLACK</b>, Maternal Grandparents, are Petitioners.</p> <p><b><u>Please see file for details</u></b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Father of Veronica (Unknown)</li> <li>• Clarke Gillis (Father of Clarke, Victoria, Christian, and Joseph)</li> </ul> </li> <li>2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Paternal Grandparents of Veronica (Unknown)</li> <li>• Paternal Grandparents of Clarke, Victoria, Christian, and Joseph (Unknown)</li> </ul> </li> </ol>	
Clarke Gillis, 14			
Victoria Gillis, 11			
Christian Gillis, 10			
Joseph Gillis, 9			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
Aff.Mail			x
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			x
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			

<b>Reviewed by:</b> LV
<b>Reviewed on:</b> 07/20/2016
<b>Updates:</b> 07/21/2016
<b>Recommendation:</b>
<b>File 20- Gillis/ Black</b>

Petitioner Perez, Rosemary Ruiz (Pro Per – Paternal Grandmother)

Attorney Rusca, Rosemary (Limited Scope for Jessica Mendoza – Objector – Mother)

## Petition for Appointment of Guardian of the Person

Age: 11		<p style="text-align: center;"><b><u>TEMPORARY EXPIRES 7/26/16</u></b></p> <p>ROSEMARY RUIZ PEREZ, Paternal Grandmother, is Petitioner.</p> <p style="text-align: center;"><b><u>Please see file for details</u></b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Minute Order of 06/09/2016 (Hearing on Temporary Petition): The Court grants the temporary guardianship to preserve the status quo, without prejudice. The order is not meant to circumvent or claim superior judgement over the family court. All current family law visitation orders remain in full force and effect. The Court orders that Rudy Ramirez, Jr., father, shall not reside in the home of Rosemary Perez nor visit at any time or for any reason. For the record, Ms. Rusca represents that they have no objection to Ms. Perez joining into the family law matter.</p> <p>Note: A hearing on the mother's petition for modification of custody/visitation in Family Law Case No. 05CEFS04302 is set for hearing on 07/25/2016 in Dept. 201.</p> <p>1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for unless the court dispenses with notice:</p> <ul style="list-style-type: none"> <li>• Jose Mendoza (Maternal Grandfather)</li> <li>• Rosalie Wiggins (Maternal Grandmother)</li> </ul>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w/
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 07/20/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 21- Ramirez</b></p>				

Petitioner Juarez, Carmen (Pro Per – Mother – Petitioner)

Petitioner Juarez, Gilbert (Pro Per – Father – Petitioner)

## Petition for Appointment of Temporary Conservator of the Person and Estate

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			<u>Court Investigator Dina Calvillo to advise rights, file report.</u>
			<u>Note:</u> This petition was originally set for hearing on 8/1/16; however, upon review, the Court moved the hearing date to 7/26/16. Notice of the hearing date change was mailed to Petitioners on 7/19/16.
	Aff.Sub.Wit.		1. The petition is not signed/verified by Petitioner Carmen Juarez.
✓	Verified	x	2. Need Confidential Conservator Screening Form for Petitioner Carmen Juarez.
	Inventory		3. Need Notice of Hearing.
	PTC		4. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on Norma Jean Juarez (Proposed Conservatee).
	Not.Cred.		5. The Court may require clarification regarding the source of Ms. Juarez' income. Pursuant to Local Rule 7.15.4, if the only asset or income is public assistance benefits, conservatorship of the estate is not required.
	Notice of Hrg	x	6. Petitioners list themselves as the only relatives within the second degree. List should include parents, grandparents, siblings, children, grandchildren, if any. The Court may require clarification.
	Aff.Mail	x	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	x	
✓	Conf. Screen	x	
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report	x	
	9202		
	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 7/20/16
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 22- Juarez